



**Board of
Examiners**

September 2003

Update

Completion of Stage 1 Evaluation of Applications

The Panel of Judges met on July 31, 2003, to review the results of the Stage 1 Examiner evaluation of written applications for the 2003 Malcolm Baldrige National Quality Award (MBNQA). The Judges selected 35 organizations to move forward to the Stage 2 evaluation, or the consensus review stage. Of the applicants, there are seven education organizations, twelve health care organizations, six manufacturing companies, seven service companies, and three small businesses proceeding to the Stage 2 evaluation.

New Sections to Be Added to the 2004 Criteria Booklet

Work has begun on the update of the 2004 Criteria for Performance Excellence booklet. In the 2004 Criteria, a commentary on the Organizational Profile will be included in the Category and Item Descriptions. (The Category and Item Descriptions amplify each Item, giving the purpose of the Item, its requirements, and commentary on the intent of the Item.) The 2004 Criteria also will contain a useful index of key terms pointing readers to the page(s) where these terms occur. Additionally, the Scoring Guidelines will be updated to make them easier to understand and to apply in scoring.

No changes will be made to the Criteria themselves or the Item Notes so organizations that are planning to apply for the Baldrige Award in 2004 have the opportunity to begin writing their applications now. In 2004, Eligibility Certification Packets will be due on April 13, and Award Applications will be due on May 27.

Final Judge Appointed for 2003 Panel

Secretary of Commerce Donald Evans recently appointed Joseph (Joe) Sober to the 2003 MBNQA Panel of Judges. Joe is the Vice President and General Manager of Dana Torque Traction Integration Technologies of Toledo, Ohio. In addition to his industry expertise, Joe brings knowledge and insights from his organization's experiences as a 2000 Baldrige Award recipient in the manufacturing category. On the panel, Joe joins Ruth Ash, Roy Bauer, Dale Crownover, Deborah Lee-Eddie, Kay Kendall, Deb Myers, Harry Reedy, and Kathy Yeu.

2003 Regional Conferences Start in September

There is still time to register for the 2003 Baldrige Regional Conferences that are scheduled to begin in September. The conferences are being held on September 23 at the Hilton Cincinnati Netherland Plaza (Cincinnati, Ohio) and on October 9 at the Hilton Scottsdale Resort and Villas (Scottsdale, Arizona). New features this year include a pre-conference workshop on "Getting Started With the Baldrige Criteria" and a pre-conference session on the "Changes to the 2003 Baldrige Criteria." For more information and on-line registration, visit the Baldrige Program's Web site at www.baldrige.nist.gov/2003_Regionals/Regionals.htm.

We would like to thank all of the Examiners and Award recipients who volunteered to be moderators and speakers at this year's Regional Conferences. We appreciate all your hard work to make the conferences successful.

2003 Workshop for State and Local Quality Award Programs

More than 50 representatives from 31 programs attended a two-day state and local quality award workshop, July 28–29, on the campus of the National Institute of Standards and Technology (NIST) in Gaithersburg, Maryland. The planning committee—Brian Knight, Mike Langridge, and Chris Stevens—developed an agenda using the evaluation results from the 2002 workshop, a survey of state and local representatives, and discussion from the Quest for Excellence XV state and local business meeting.

Highlights of the workshop included a demonstration of the State and Local Web Site, a vehicle for state and local programs to share information about their programs. The State and Local Metrics Subteam made a presentation on the common metrics that have been developed. Four state programs shared information on their marketing and fundraising approaches, and two outside experts provided valuable insight on these topics. Harry Hertz, Director of the Baldrige Program, led a discussion on the importance of maintaining the integrity of the examination and judging processes. With growing need for vigilance in organizational ethics, quality award programs should be role models. These award programs

will be challenged continuously to put into place strict firewalls between their Award processes and the consulting services that some are starting to offer.

Three state programs—Illinois, Oklahoma, and Wisconsin—were presented with a State and Local Appreciation Award for their role in encouraging their state award recipients to become involved in the Baldrige process. The Illinois program was recognized for encouraging SSM Health Care, a 1999 recipient of the Lincoln Award for Business Excellence. The Oklahoma Quality Award Foundation was recognized for encouraging SSM Health Care, a 1998 recipient of the Oklahoma Quality Award. The Wisconsin Forward Award program was recognized for encouraging SSM Health Care, a 2000 recipient of the Wisconsin Forward Award.

Two other programs that could not attend also were recognized. The Excellence in Missouri Foundation was recognized for encouraging SSM Health Care, a 2002 recipient of the Missouri Quality Award. The Quality Texas Foundation was congratulated for providing encouragement to Branch-Smith Printing, a 2001 recipient of the Texas Quality Award.

Next year's state and local workshop will be held July 26–27, 2004.

2003 Improvement Day

The Baldrige National Quality Program (BNQP) hosted its annual Improvement Day on July 30, 2003, with about 40 attendees sharing ideas and suggestions for improvement. Sessions focused on the Criteria for Performance Excellence, the Scoring Guidelines, how to improve feedback to Baldrige Award applicants, and other Program processes. In addition to the verbal input provided during Improvement Day, supplemental suggestions were obtained through a Call for Comments via BNQP's Web site. We will be reviewing the recommended suggestions and using them to help drive Program improvements during the coming year. Next year's Improvement Day is scheduled for Wednesday, July 28, 2004.

We would like to take this opportunity to thank Steve Heisey, Kay Kendall, Don Lighter, Ron Marafioti, Joe Muzikowski, Mark Pietz, John Rose, and Jim Zurn for serving as facilitators for the sessions. Thank you also to the participants and to those who offered suggestions through the Call for Comments.

2004 Examiner Application

For 2004, we are again offering an on-line version of the application for the Board of Examiners. On November 10, the 2003 board members and other applicants from last year will receive information by e-mail about how they may access relevant portions of last year's application. These individuals may update or correct the information, accessing it as many times as they want until they submit their 2004 application. New applicants will create an application that they also may access as desired until they choose to formally submit it.

For those who do not wish to submit their information on-line, the PDF and Word versions of the application will be available, as in years past, for downloading at www.baldrige.nist.gov. (Please note that the Examiner application booklet will not be printed this year.)

The 2004 Examiner application will be available from November 10, 2003, until January 5, 2004. The on-line version must be submitted by January 5, 2004, and paper copies must be postmarked no later than January 5, 2004, as well.

Put On Your Ambassador Hats and Help Recruit Examiners for the 2004 Board!

We are already starting to recruit for the 2004 Board of Examiners, and we can use your help. Every year, word of mouth is our most effective recruitment strategy. So, if you know of potential Examiners, please encourage them to apply. Next year, we will be expanding the Board of Examiners to accommodate the increased Award application numbers we have experienced.

As always, Category coverage and balance are important factors in maintaining a strong Board of Examiners. To ensure adequate coverage and balance, we are specifically seeking Examiners with expertise in finance, the hospitality industry, the utility industry, and transportation. Other areas of need are K-12 education, health care, large manufacturing, small business (manufacturing and service), government, and not-for-profit. There is always a need for more individuals with senior management experience.

To assist you in your recruitment efforts, we will be sending you an e-mail message in early November to share with your colleagues. The e-mail message will include a link to our on-line brochure and application. You can also request hard copies of our "Get On Board" recruitment brochure at any time by contacting Melissa

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Pollack (301-975-8950) or Jamie Ambrosi (301-975-2715). This brochure provides an overview of the benefits of being an Examiner and serves as a useful recruitment tool at conferences and other speaking engagements. We encourage you to take copies of the brochure with you to outreach events in which you participate this fall. Thanks in advance for your help with our recruitment efforts this year.

Just-In-Time Materials Available On-line for Consensus and Site Visit Teams

This year, we launched a new Examiner resource page on our Web site that contains just-in-time information and materials for Consensus Teams and Site Visit Teams. The page contains two main sections—one devoted to consensus review and the other to site visit review. Each contains a flowchart, manual, and "Frequently Asked Questions" document on the respective process. In addition, there is a video presentation on the process and support materials for the presentation, including PowerPoint slides and handouts. The consensus portion of the site went live in late July, and the site visit portion will be available in mid-September. We encourage you to view the online resources at www.baldrige.nist.gov/Examiner_Resources.htm.

Site Visits—Examiner Reimbursements/Voluntary Contributions

Since the Award application review process receives no federal funding and application fees are kept to a minimum, the Award Program continues to operate with maximum voluntary support. As with other phases of the process, Examiner support and contributions are greatly appreciated in regard to site visit reimbursement because fees collected from Award applicants do not cover all of the costs incurred for site visits. The Award Program charges small businesses, for-profit education organizations, and health care organizations with fewer than 500 employees at half the rate of applicants with over 500 employees. The site visit fee for not-for-profit educational organizations is \$1500. The site visit fee for all other organizations is based on the size of the Site Visit Team, the length of the site visit, and the average percentage of Examiners who require reimbursement. So Examiner voluntary support, if feasible, bolsters the Program during the site visit stage of the Award process.

In cases where site visit reimbursement for Examiners is necessary, the NIST site visit monitor will poll the Site Visit Team during the team's initial planning call to identify those who need reimbursement. Examiners will be reimbursed for all appropriate expenses incurred

during the site visit. If you have questions or need further information, please call Rachel Kinney at 301-975-8035, or send her an e-mail at rachel.kinney@nist.gov.

Examiner Ambassador Activities

John Conyers and Len Deneault reported outreach efforts between April and early August. John, in fact, reported 15 presentations to groups on the Baldrige Criteria and its use to achieve organizational excellence in any sector! Jim Shaw (former Examiner) recently wrote an industry newsletter article on the benefits of Baldrige. In addition, the following Examiners (including Alumni and former Examiners) requested the portable exhibit and/or outreach materials: Jackie Beede, Len Deneault, Kathy Free, Paula Friedman, Jackie Hall, Andrea Jandebaur, Brian Knight, Mike Langridge, Elizabeth Menzer, Tina Shoemaker, Mike Strong, Marie Williams, and John Zedlick.

We thank all of these ambassadors for their outreach activities on behalf of the Program. If you have conducted outreach efforts on behalf of the Program, we'd love to know and recognize you! Please report your activities to our Outreach and Communications Team via fax at 301-948-3716 or e-mail at nqp@nist.gov.

BNQP Staff Walk the Walk, Practice What They Preach

BNQP staff take the Baldrige Criteria for Performance Excellence seriously, so seriously in fact that they have set up a program to actively support and strengthen the local community.

Seven categories make up the Baldrige Criteria, which are used by organizations to improve their overall performance. As part of the Leadership Category, organizations are asked to examine how each addresses its public and community responsibilities.

Last fall, BNQP management decided to provide staff the opportunity to practice what they preach by volunteering in the local community. To ensure that the simple task of setting up a volunteer program did not develop a life of its own, guidelines were established: (1) the task force should consist of a member from each of BNQP's six self-directed teams, and (2) the task force should complete its assignment in not more than three meetings. Task force volunteers were solicited, and criteria for selecting the community organizations were established.

After the program was set up, BNQP selected four community organizations to help: Food and Friends in Washington, D.C., an organization that focuses on food preparation, delivery, and transportation to more than 1100 people living with HIV/AIDS and other

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life-challenging illnesses; Burnt Mills Elementary School in Silver Spring, Md., "where children and learning come first" and where 11 percent of the 700 students are first-time English speakers; Springvale Terrace, a caring, nonprofit retirement community with optional personal care services in Silver Spring, Md.; and the Gaithersburg Upcounty Senior Center, which hosts an active and diverse population of seniors who enjoy many programs, activities, and services.

The BNQP staff performed a variety of tasks. At Food and Friends, they washed their hands, put on hairnets and gloves, and assembled and packed grocery bags containing the various elements of a one-day supply of meals for delivery that afternoon. (Menus are varied and driven by the dietary requirements of the people served.) At Burnt Mills Elementary School, volunteers participated in Reading Initiative Week and helped teachers with ongoing projects. One volunteer found she needed to call upon her Spanish skills as soon as she stepped across the threshold; another helped children grapple with the meaning and importance of standards. Yet another helped to put together a huge floor puzzle. A group of volunteers at Springvale Terrace conducted an ice cream social, serving up custom-made ice cream sundaes with the residents' favorite toppings. Volunteers also provided escort services—transporting wheelchair residents to their rooms.

Volunteers at the Upcounty Senior Center designed and delivered classes on upgrading computer skills and designing collages, and they organized a sing-a-long. The efforts by BNQP staff were appreciated. In a note

to volunteers after their visit, the center's program supervisor thanked BNQP staff for their well-planned efforts: "We want to thank you profusely and sincerely hope you'll brighten our walls, minds, and hearts again soon. Our stroke group felt especially included in the sing-along.... You found ways to communicate with our diverse population who...today were united in song, art, and technology."

Appreciation was felt both ways as Baldrige Program staff welcomed the opportunity to give back to the community. "I received much more than I gave," said one volunteer, while another added, "I felt great while we were doing it and even better when I realized the impact we were having."

2003 Case Study Packet

The 2003 Case Study Packet is available now on the Baldrige Web site. Along with the GeoOrb Polymers, North America (G-ORB) Case Study, the packet includes an Executive Summary, the G-ORB Scorebook, the G-ORB Feedback Report, and the Handbook for the Board of Examiners. These tools, when used in conjunction with the 2003 Business Criteria for Performance Excellence and the Scorebook for Business, Education, and Health Care, illustrate the Award application and review process. Check out these valuable resources without delay on the Baldrige Web site (www.baldrige.nist.gov/GeoOrb.htm).

2004 Baldrige Process Calendar

For your planning for the upcoming year, key dates in the 2004 Baldrige Process are available on the Baldrige Web site at www.baldrige.nist.gov/Calendar.htm.

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The official newsletter for the Board of Examiners of the Malcolm Baldrige National Quality Award.

Publisher American Society for Quality—Administrator,
Malcolm Baldrige National Quality Award

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The Malcolm Baldrige National Quality Award
Newsletter is published on an as needed basis.